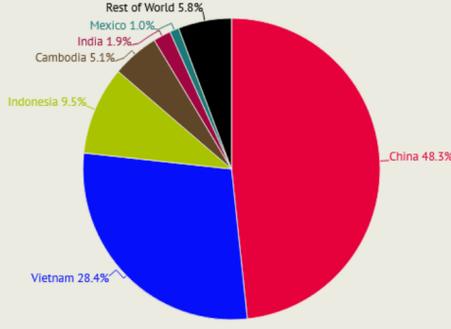


FDRA SHOE SOURCING & SUPPLY CHAIN UPDATE

A <2 Minute Update on Supply Chain Costs and Shifts

US Total Footwear Import Report

Distribution of YTD* 2025 Total U.S. Footwear Import Volume



Reflecting Shipments through November 2025

By the numbers: As duties paid on footwear imports stretched sharply higher again, both the *value* and *volume* of US footwear imports retreated for the seventh straight month in November.

At \$1.8 billion, the Customs value of shipments tumbled -16.6% from November 2024. Plunging -20.5%, the volume of imports fell even faster, with both lower at double-digit rates for the third straight month.

Why it matters: We maintain our earlier caution that as retailers and brands work through inventories of earlier imports front-loaded before duties surged, these dramatically higher duties are likely to permeate the supply chain.

Go deeper: [click for total footwear import data & graphs](#)



U.S. Footwear Import Reports (by category)



Athletic Footwear: The value and volume of US athletic footwear imports both faded again in November, off -23.7% year over year in value terms and -26.4% in volume terms, the third straight double-digit drop for both measures.

Men's Footwear: Also under pressure from soaring duties, the volume and value of men's footwear imports tumbled again in November, falling -22.9% year over year in volume terms and -16.7% in value terms.

Women's Footwear: Responding to another triple-digit surge in average duties per pair paid in November, the value and volume of women's footwear imports retreated year over year again in this latest month.

Children's Footwear: The value and volume of US children's footwear imports plunged year over year again in November. The value of imports tumbled -25.8% while the volume of these imports retreated -21.6%.

Boots: Declining for the thirty-third time in the last thirty-eight months, bootwear imports sank again in November, tumbling -13.7% in volume terms and -8.5% in Customs value terms.

Leather Footwear: The value and volume of leather footwear imports retreated in November, as shipments saw another triple-digit surge in duties paid.

- The Customs value of these imports dropped -14.3% from a year earlier while the volume of shipments fell -19.8%.
- Meanwhile, duties paid soared 120.3% from twelve months earlier, the sixth straight *triple*-digit jump.

Sandals: As tariffs on sandal imports jumped to the biggest November on record, the *value* and *volume* of these imports retreated year over year again, declining -7.6% in value terms and -16.9% in volume terms.

Footwear Commodities Cost Report



A current issue that catches our attention this month: [Shoe boxes and pulp prices.](#)

Cotton/Textiles: Cotton futures have firmed over recent weeks on prospects for tighter US and world cotton balance sheets. But extended gains in 2026 may prove limited without stronger demand for the fiber or a weaker dollar.

Leather: Since touching a near-term low in November, live cattle futures have rebounded appreciatively on prospects for tighter fed cattle supplies over the second half of 2026 while domestic demand remains solid.

Oil: The drumbeat of lower oil prices in 2026 remains the market's persistent cadence, despite crude edging higher over recent weeks.

Rubber: Rubber prices across key Asian markets continue to drift modestly higher since October.

Polyester Fiber & PET/Plastics: While most prices across the petrochemical supply chain tapered as the calendar turned to 2026, prices for some feedstocks and synthetic fibers surprised to the upside.

Go deeper: [Read the full report here with charts & analysis](#)

FDRA Sourcing Shifts Webinar
Country-by-Country Analysis of Shoe Production Numbers, Challenges and Opportunities
 Thursday, March 26 • 2 pm ET

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